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Wealthtech Weekly

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By Rob Burgess
Reporter

Most consumers, 87%, say ads still need a human touch, and 74% say they are more likely to purchase from an ad created entirely by humans than an AI-generated one. This means advisors who use AI in their marketing and communications strategies need to be incredibly thoughtful about how they go about it.

Marketing experts I heard from say **coming across as robotic and inauthentic could cost advisors both leads and clients**.

Also this week:

- Here's how **agentic AI is showing up in advisor workflows**
- Explore the many ways **tech missteps can sink succession plans**
- Financial advisors say **AI will reshape portfolio construction.**

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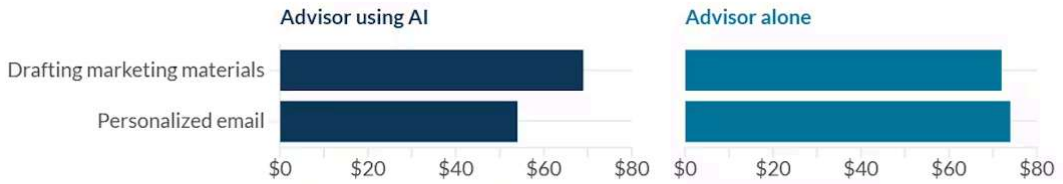
AI for advisor marketing — without alienating clients



Source: "What Do Investors Think About Generative AI In Financial Advisors' Workflow?" Originally published in September 2024

Recent studies have shown that clients and prospects want human authenticity, even as AI tools become more prevalent in firms' workflows.

- **How agentic AI is showing up in advisor workflows**
  As AI agents move from theory to reality, some advisors are implementing these tools into their technology stacks, but not without human oversight.
- **Tech missteps can sink succession plans**
  Advisors who seek a smooth transition should take a hard look at their data and tech stack before any succession planning begins, experts say.
- **AI will reshape portfolio construction, say financial advisors**
  A Financial Planning survey found that advisors believe AI will continue to transform wealth management. But experts say human oversight is still essential.
- **AI slop is everywhere. How can advisors cut through?**
  A recent study found that more than half of all new articles on the internet were AI-generated. How can advisors help their own content stand out when this deluge threatens to drown them out?

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